



MONTANA HISTORY & CIVICS EDUCATION ENDOWMENT

Support the Montana History & Civics Education Endowment and give every child in Montana the opportunity to visit the Montana Heritage Center and State Capitol. The endowment brings heritage to life for K-12 students by providing funding for field trips and education resources that connect their experience to classroom activities.

MONTANA ENDOWMENT TAX CREDIT

The Montana Endowment Tax Credit (METC) allows donors to pay less in Montana state income taxes when they give a planned gift to a qualified Montana charitable endowment, like the Montana History & Civics Education Endowment Fund.

	FOR INDIVIDUALS	FOR BUSINESSES
TYPE OF GIFT	Planned Gift (Deferred Gift Annuity) of cash or appreciated securities. <i>Minimum gift size \$5,000.</i>	Direct gift of cash or appreciated securities. <i>No minimum gift size.</i>
AMOUNT OF MONTANA ENDOWMENT TAX CREDIT	40% of the initial gift, up to max credit of \$15,000 per taxpayer (\$30,000 for joint filers). <i>The remaining gift amount provides a federal tax deduction.</i>	20% of gift amount, up to max credit of \$15,000. <i>The remaining gift amount provides a federal tax deduction.</i>

HOW TO MAKE A METC GIFT

NOW

MEET

Schedule a planning meeting

GIVE

Make your gift to WCF

SIGN

Finalize deferred annuity paperwork

IN 5 YEARS

INVEST

Your gift will grow over the 5-year annuity period

SIGN

Release the gift to the MT History & Civics Education Endowment

SAVE

Claim an additional federal tax deduction

Donor Advised Funds and private foundations can support the Endowment directly but are not eligible for the Montana Endowment Tax Credit.

NOT INTERESTED IN THE MONTANA ENDOWMENT TAX CREDIT?

MAKE A DIRECT GIFT

- Check, ACH or Wire Transfer
- Appreciated Public Securities
- Credit Card (online or by phone)
- IRA Charitable Distributions
- Donor Advised Fund Grants
- Private Foundation Grants
- Corporate Foundation Grants



FOR MORE INFORMATION ON GIVING PLEASE CONTACT:



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